



Clarity Visualization Strategy: Reporting by Persona

Your Guides:
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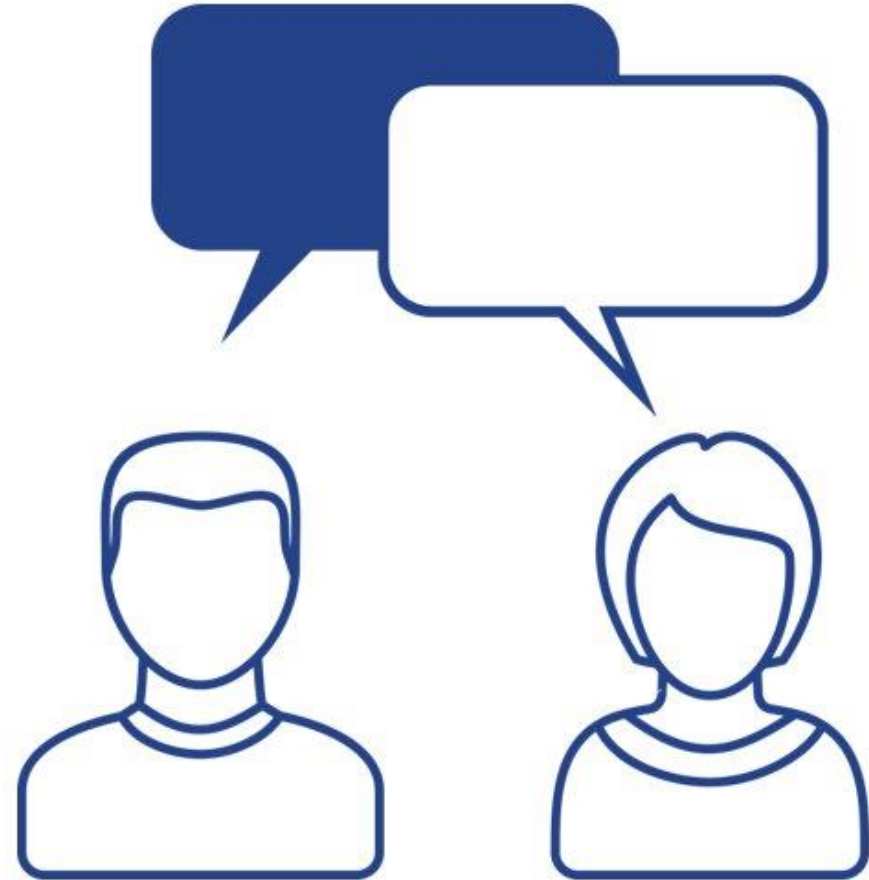
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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

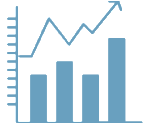
- Introduction
- Persona-Based Reporting
- Sample Reporting Metrics
- Additional Resources

Persona-Based Reporting

Why Persona-Based Reporting?



Each persona has unique reporting needs and preferences



Tailored reports help to:

- Improve user adoption and engagement
- Increase efficiency
- Drive better decision-making

How to Do Persona-Based Reporting



Understanding User Personas:

- Define and explain the various user personas to employees within the organization that interact with Clarity
- Highlight the unique reporting needs and preferences of each persona



Persona Mapping and Analysis:

- Showcase examples of persona mapping and how it aligns with reporting requirements
- Illustrate how persona analysis helps inform customized reports for different user groups



Customized Reporting Solutions:

- Examples of persona-based report templates and dashboards tailored to specific user personas



Implementation Strategy:

- Address considerations such as data segmentation, report design, and user training

What Are the Personas?



Leadership

Need high-level summaries and key performance indicators (KPIs) to make strategic decisions.

Strategy

Provide dashboards with visualizations of overall project health, budget status, and strategic insights. Focus on concise, actionable data to aid decision-making at a glance.

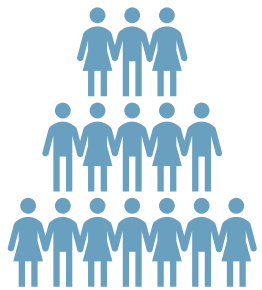


Portfolio Managers

Portfolio managers oversee multiple projects and need portfolio-level insights and performance metrics.

Strategy

Provide portfolio status reports, benefit realization analyses, risk exposure reports, and portfolio health dashboards. Include resource demand versus capacity across projects, strategic alignment analyses, and portfolio risk assessments.



Resource Managers

Resource managers focus on resource allocation, capacity planning, and team productivity.

Strategy

Provide resource allocation reports, demand versus capacity analysis, team workload summaries, and skill inventory reports. Include graphs showing resource utilization and availability for efficient resource management.

What are the Personas?



Financial Analyst

Financial analysts require cost tracking, budget forecasting, and financial performance metrics.

Strategy

Offer financial reports with budget vs. actuals comparisons, cost breakdowns, variance analysis, and profitability metrics. Include cost-benefit analyses, and financial KPIs to support financial decisions.

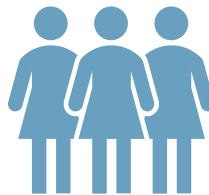


Project Manager

Project managers need detailed project progress, resource allocation information, and risk assessments.

Strategy

Offer detailed project reports with task status, resource utilization, budget tracking, and risk analysis. Include Gantt charts, resource histograms, and project variance analyses for effective project management.



Team Member

Team members focus on task assignments, progress updates, and collaboration within projects.

Strategy

Offer individual task progress reports, time tracking summaries, collaboration metrics, and team performance dashboards. Include personalized task lists, upcoming deadlines, and team communication insights.

Persona-Based Strategy:

Demand vs. Capacity Example

Demand vs. Capacity

- **Demand:** How much work needs to be done? [**Allocation**]
- **Capacity:** How many resources do we have? [**Availability**]
- Affects budget planning, hiring strategy, resource placement, project prioritization, etc.
- **[Remaining Capacity] = [Availability] – [Allocation]**

> 0 Capacity available	Availability > Allocation Can take on more work
= 0 Fully allocated	Availability = Allocation No buffer remains — monitor timing closely
< 0 Capacity shortfall	Availability < Allocation Rebalance resources, defer demands, engage contractors, or hire

Leadership



Which roles do we need to hire, and when?

Gap Analysis (Demand - Supply)

Project Role	Sep 26	Oct 26	Nov 26	Dec 26	Jan 27	Feb 27	Mar 27	Apr 27	May 27	Jun 27	Jul 27	Aug 27
Business Analyst	-0.75	-1.09	-1.50	-1.75	-2.00	-2.00	-2.14	-18.33	-18.63	-18.63	-18.63	-18.63
Data Architect - Platform	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00
Manager Quality Assurance	-0.60	-0.72	-0.80	-0.80	-0.80	-0.90	-0.90	0.10	0.10	0.10	0.10	0.10
Quality Assurance Specialist	-0.60	0.50	-1.25	-3.25	-3.25	-3.25	-3.25	-8.75	-9.75	-9.75	-9.75	-9.75

Peak Demand Analysis

Project Role	Avg Supply	Peak Demand	Peak Month	Peak Gap	FTE To Hire
Business Analyst	22.58	22.25	Sep 2026	-0.75	0
Data Architect - Platform	0.00	1.00	Sep 2026	1.00	1
Manager Quality Assurance	1.00	1.10	Apr 2027	0.10	1
Quality Assurance Specialist	11.42	12.50	Oct 2026	0.50	1

Leadership



Brain Teaser:

- Do people work outside of their primary role?

Resource Detail - Resource: Revelina, Natalia | Primary Role : Data Scientist FY, Month: Multiple selections ▼

NOTE: [Primary Role Supply] = [Total Capacity] - [Allocation to Admin / Innovation] - [Cross-Role Allocation Out] Select a month on the left to see details on the right

Month	Total Capacity	Allocation to Admin / Innovation	Cross-Role Allocation Out	Primary Role Supply	Resource Gap
Sep 26	1.00	0.20	0.80	0.00	0.00
Oct 26	1.00	0.20	0.80	0.00	0.00
Nov 26	1.00			1.00	1.00
Dec 26	1.00			1.00	1.00
Jan 27	1.00			1.00	1.00
Feb 27	1.00			1.00	1.00
Mar 27	1.00			1.00	1.00
Apr 27	1.00			1.00	1.00

Allocation to Admin / Innovation				
Month	Investment	Allocation to Admin		
Sep 26	0.20 Daily Operations	0.20		
Oct 26	0.20 Daily Operations	0.20		
Total		0.40		

Cross-Role Allocation Out				
Month	Investment	Project Role	Cross Role Allocation	Work Type
Sep 26	0.80 Working 100% Project	Data Migration Specialist	0.80	Project
Oct 26	0.80 Working 100% Project	Data Migration Specialist	0.80	Project
Total			1.60	

Primary Role Allocation				
Month	Investment	Project Role	Allocation	Work Type

Leadership



Brain Teaser:

- How does cross-role allocation impact supply?

Note: [Supply] = [Total Capacity] - [Cross-Role Allocation Out] + [Cross-Role Allocation In] *Blue Text Indicates [Cross-Role Allocation In]*

Project Role	Sep 26	Oct 26	Nov 26	Dec 26	Jan 27	Feb 27	Mar 27	Apr 27	May 27	Jun 27	Jul 27	Aug 27	Total
Data Migration Specialist	0.80	0.80											1.60
Koushik Natalia (Primary Role: Data Scientist)	0.80	0.80											1.60
Data Scientist	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	10.00
Koushik Natalia (Primary Role: Data Scientist)	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	10.00

Leadership



What projects can be completed with existing resources?

Waterline by				Period				2025-10				2025-11
Primary Role				Water Team				US RES PM				US RES PM
Investment	Seq	Kickoff	Finish	Project Management	Data & Analytics	Project Engineer	Reliability Engineer	Project Management	Data & Analytics	Project Engineer	Reliability Engineer	Project Management
Resource Total Capacity				2.0	1.0	10.0	3.0	2.0	1.0	10.0	3.0	2.0
NPI Capacity				1.0	0.5	7.3	1.7	1.0	1.0	7.4	1.7	1.0
Resource Total Demand					0.7	4.5	2.4		0.7	4.6	2.4	
Resource Demand					0.7	3.5	2.2		0.7	3.8	2.3	
Role Demand						1.0	0.3			0.8	0.2	
Resource Availability (Need)				1.0	-0.2	2.8	-0.7	1.0	0.3	2.8	-0.7	1.0
00597- PROGRESS	1		12/31/2027		0.1		0.4		0.1		0.4	
00694- HILAND	1		12/10/2026		0.1		0.2		0.1		0.2	
00904- HILAND	1		9/16/2027		0.1	0.8	0.2		0.1	0.8	0.2	
01371- HILAND - ASSE HILAND LA...	1	6/20/2025	9/22/2026			0.3				0.3		
00332- HILAND - Commercial Integrat...	2		7/28/2028		0.1		0.4		0.1		0.4	
00695- HILAND	2		7/15/2027									
00915- HILAND	2		7/1/2027									
01257- HILAND - Ultra Low CO2 ...	2	4/8/2025	11/5/2027			0.5				0.5		
00564- HILAND 2 Commercial Global Pl...	3		10/22/2026		0.1		0.4		0.1		0.4	
00574- HILAND Light	3		5/31/2029		0.1		0.2		0.1		0.3	
00950- HILAND	3		9/3/2027									
01341- HILAND	3		11/3/2028									
00942- HILAND - Commercial Glob...	4		12/10/2027				0.1				0.1	

Resource Manager



Is anyone on my team overbooked? Who can take on more work?
What work remains unassigned?

Quarter	Q3-2025		Q4-2025			Q1-2026			Q2-2026			
Resource Level	2025-08	2025-09	2025-10	2025-11	2025-12	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06	2026-07
☐ Unfilled Role	0.6/0.0	0.6/0.0	0.6/0.0	0.8/0.0	1.0/0.0	0.9/0.0	0.9/0.0	1.2/0.0	1.2/0.0	1.2/0.0	1.4/0.0	1.4/0.0
50080-Application Analyst / Programmer - Unfilled Role	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
50080-Application Developer - Unfilled Role	0/0	0/0	0/0	0.1/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0
50080-Application Lead - Unfilled Role	0.2/0.0	0.2/0.0	0.2/0.0	0.2/0.0	0.3/0.0	0.2/0.0	0.2/0.0	0.2/0.0	0.2/0.0	0.2/0.0	0.2/0.0	0.2/0.0
50080-Compliance & Certification - Unfilled Role	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.3/0.0	0.6/0.0	0.6/0.0	0.6/0.0	0.8/0.0	0.8/0.0
50400-Business Process Analyst - Unfilled Role	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0
52510-Cloud Engineer - Unfilled Role	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
☐ Named Resource	76.6/94.8	70.6/94.8	68.1/94.7	68.2/94.8	57.8/94.9	44.9/94.7	46.0/94.8	42.9/94.8	42.3/94.8	43.4/94.8	41.0/94.8	39.2/94.7
50070-Andrew, Richard	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	0.4/1.0	0.2/1.0	0.2/1.0	0.2/1.0	0.2/1.0	0.2/1.0	0.2/1.0
50070-Ivan, Digital	0.1/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0
50090-Marcus, Cristian	1.2/1.0	1.2/1.0	1.2/1.0	1.2/1.0	0.9/1.0	0.8/1.0	0.9/1.0	0.8/1.0	0.8/1.0	0.9/1.0	0.8/1.0	0.8/1.0
50170-Monica, Andrew	1.4/1.0	1.2/1.0	1.2/1.0	1.1/1.0	1.0/1.0	1.3/1.0	1.4/1.0	1.3/1.0	1.3/1.0	1.3/1.0	1.3/1.0	1.3/1.0
50200-Jackson, Ralyn	0.9/1.0	0.7/1.0	0.8/1.0	0.8/1.0	0.5/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.3/1.0
50200-Maria, Shilpa	2.0/1.0	1.8/1.0	1.8/1.0	1.7/1.0	0.4/1.0	0.5/1.0	0.6/1.0	0.5/1.0	0.5/1.0	0.5/1.0	0.5/1.0	0.5/1.0
50200-Pa, Clifford	0.9/1.0	1.0/1.0	0.8/1.0	0.9/1.0	1.0/1.0	1.0/1.0	1.1/1.0	1.0/1.0	0.8/1.0	0.8/1.0	0.7/1.0	0.7/1.0
50210-Michael, Roy	0.7/1.0	0.6/1.0	0.6/1.0	0.8/1.0	0.8/1.0	0.4/1.0	0.5/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.4/1.0	0.4/1.0
50210-Ingolf, Jon	1.1/1.0	0.9/1.0	0.9/1.0	0.8/1.0	0.5/1.0	0.4/1.0	0.5/1.0	0.4/1.0	0.4/1.0	0.5/1.0	0.4/1.0	0.4/1.0
50210-Manaswala, Deepali	1.2/1.0	1.0/1.0	1.0/1.0	1.0/1.0	0.4/1.0	0.6/1.0	0.7/1.0	0.6/1.0	0.6/1.0	0.7/1.0	0.6/1.0	0.6/1.0
50220-Mikael, Philip	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	1.0/1.0	1.1/1.0	1.0/1.0	1.0/1.0	1.0/1.0	1.0/1.0	0.9/1.0
Total	77.2/94.8	71.3/94.8	68.7/94.7	69.0/94.8	58.9/94.9	45.7/94.7	46.9/94.8	44.1/94.8	43.5/94.8	44.5/94.8	42.3/94.8	40.5/94.7

Resource Manager – Exceptions



Who are the overbooked resources on my team?

- A balanced year does not mean balanced months
- For example, a resource could appear properly allocated across 2027 while being overbooked in Q1 / Q2 and underallocated in Q3 / Q4

Over Allocated Resources

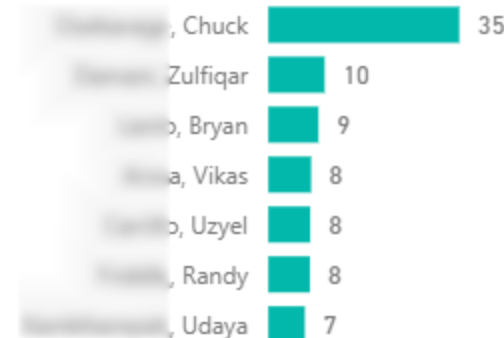
99/166 (60%)



Resource Allocations

Resource Over Allocation by Selected Unit

[Link To Staffing In Clarity](#)

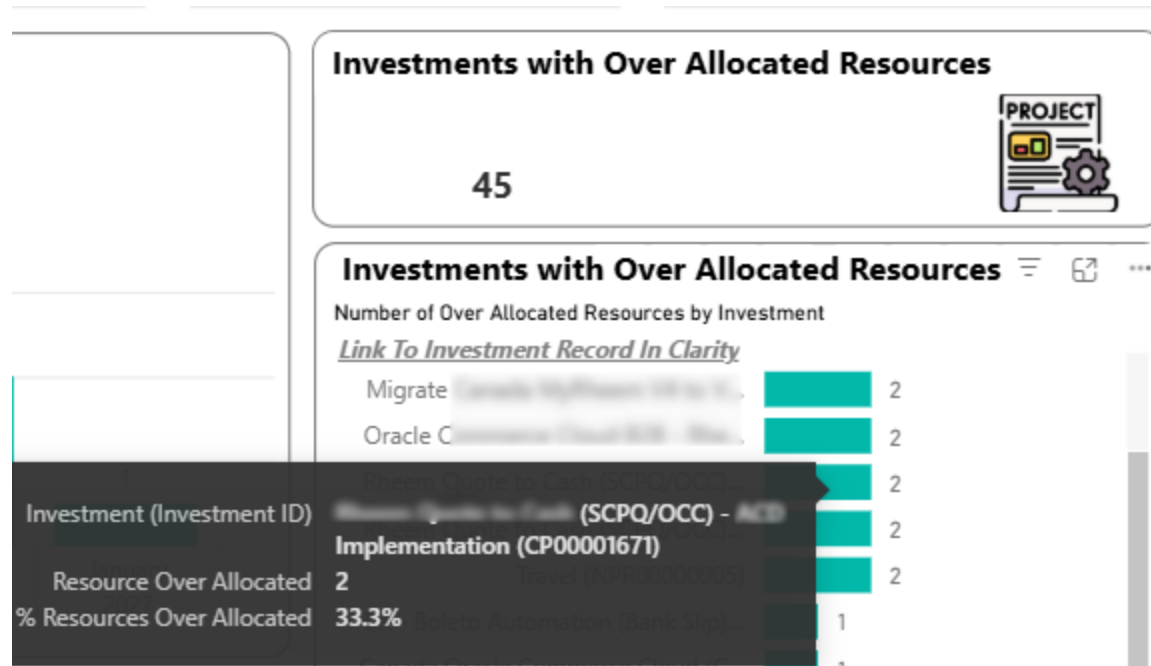


Project Manager



Is my project fully staffed?

Are any of the staffed resources overallocated?



Project Manager



When are resources overbooked?

How significant is the impact on my project?

What are the investments with over allocated resources?

[Link To Staffing In Clarity](#)

[Link To Investment Record In Clarity](#)

Red highlight indicates the months Resources are Over Allocated in

Investment (Investment ID)	Year Resource	2026					
		July	August	September	October	November	December
2026 Normal PC's collect (Normal Canada B Monthly) (CP00001938)	Isidro	0.1	0.1	0.1	0.1	0.1	0.0
	Angel	0.1	0.1	0.1	0.1	0.1	0.0
	JESUS	0.1	0.1	0.1	0.1	0.1	0.0

Project Manager



Which resources are available to be assigned to my project?

Quarter	Q3-2026			Q4-2026			Q1-2027			
Primary Role	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02	2027-03	2027-04
☐ Cloud Engineer	4.0/7.9	1.9/6.0	1.8/6.0	1.8/6.0	1.8/6.0	1.8/6.0	0.9/6.0	0.9/6.0	0.9/6.0	0.9/6.0
50170-Vance, A	0.5/0.5	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
50220-Gentil, A	1.1/1.0	1.0/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0	0.9/1.0
51260-Jelks, A	0.8/1.0	0.9/1.0	0.8/1.0	0.8/1.0	0.9/1.0	0.8/1.0	0.0/1.0	/1.0	/1.0	/1.0
51260-Pulikka, A	0.5/0.5	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
52135-van Dr, A	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0
52180-Heres, A	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0
52198-Lambe, A	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0
52200-Damar, A	0.6/0.5	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
52250-McClim, A	0.5/0.5	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0	0/0
52510-Cloud, A	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0.1/0.0	0/0	0/0	0/0	0/0
53187-Buurm, A	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0	/1.0
☐ Compliance & Certification	4.1/27.4	4.1/27.0	4.1/27.0	3.1/27.0	3.0/27.0	2.8/27.0	2.8/27.0	2.8/27.0	2.8/27.0	2.8/27.0
☐ Controls Engineer	90.5/118.9	92.2/125.2	95.6/127.7	97.2/127.7	97.0/127.7	96.1/127.7	81.3/127.7	80.4/127.7	80.0/127.7	77.3/127.7
☐ Customer Service	6.0/24.2	6.0/23.8	6.0/23.8	6.0/23.8	6.0/23.8	5.0/23.8	5.0/23.8	4.9/23.8	4.9/23.8	4.9/23.8
Total	652.6/9,154.6	736.9/9,216.0	773.1/9,337.0	749.7/9,337.1	734.2/9,337.0	724.3/9,336.9	620.0/9,337.2	604.4/9,337.0	599.7/9,337.0	590.4/9,337.0

Summary



Determine Key Insights

- Start with big picture
- Recognize that a healthy average can hide individual problems
 - Overallocated resources may offset underallocated staff
 - Under-budget projects may offset over-budget projects



Report not only on what is present, but also what is missing

Open Mic

- Can you share examples of your reporting strategy that are driving success?

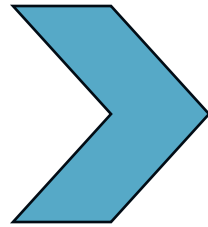
Bonus Deep Dive

Report Design Steps

What to Show

Decide What Matters

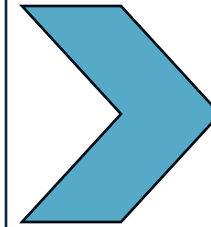
- Tailored to your audience
- Sample persona-specific metrics



How to Show

Make the Signal Obvious

- Exceptions and outliers
- Visual techniques
- Notifications and alerts



How to Solve

Enable the Next Action

- Guidance toward resolution
- Enable action

What to Show



Sample Persona-Specific Metrics

- **Executive Leaders:** “PMs are overallocated by 2 full-time equivalents (FTEs) in 2026”
- **Resource Managers:** “Team allocation at 100%, with 5 members at 70%, 2 at 175%”
- **Project Managers:** “Projects fully staffed, but some resources are overallocated in other commitments”
- **Resources:** “Overall balanced, but overallocated in Q1 / Q2 and under in Q3 / Q4”



Report Usage Considerations

- Refresh frequency
- Presentation method (self-serve, email / export, etc.)

How to Show



Highlight Exceptions

- Instead of overall cost versus budget, specifically call out over-budget projects
- Highlight overallocated resources and the affected months



Visual Techniques

- Conditional formatting
 - Color coding
 - Highlighting
 - Icons
- Drill-down navigation
- Drill-through navigation



Notify and Alerts

- Mobile KPI alerts

How to Solve



Integrate Helpful Context

- Use tooltips for calculation formula, field descriptions, or instructions to resolve



Link Directly to Bad Data

- Add hyperlinks back to Clarity records. Now also available for:
 - Risks
 - Issues
 - Change Requests



Facilitate Communication

- Email responsible parties using a dynamically prefilled subject line and body message



Schedule and Distribute

- Subscriptions for scheduled delivery

Accessing Your Data

Flat File

Flat file exports from Clarity for quick ad hoc analysis.

- **PROS:** Quick and easy
- **CONS:** Data could be siloed or stale, requires manual refreshes, not sustainable, security / encryption concerns

OData / Ofast

An out-of-the-box (OOTB) way to access the Data Warehouse (DWH) data via business intelligence (BI) applications.

- **PROS:** Easy to configure / setup, easy to include additional tables / fields
- **CONS:** Some fields not available in DWH, and DWH jobs must be scheduled

Rego OData

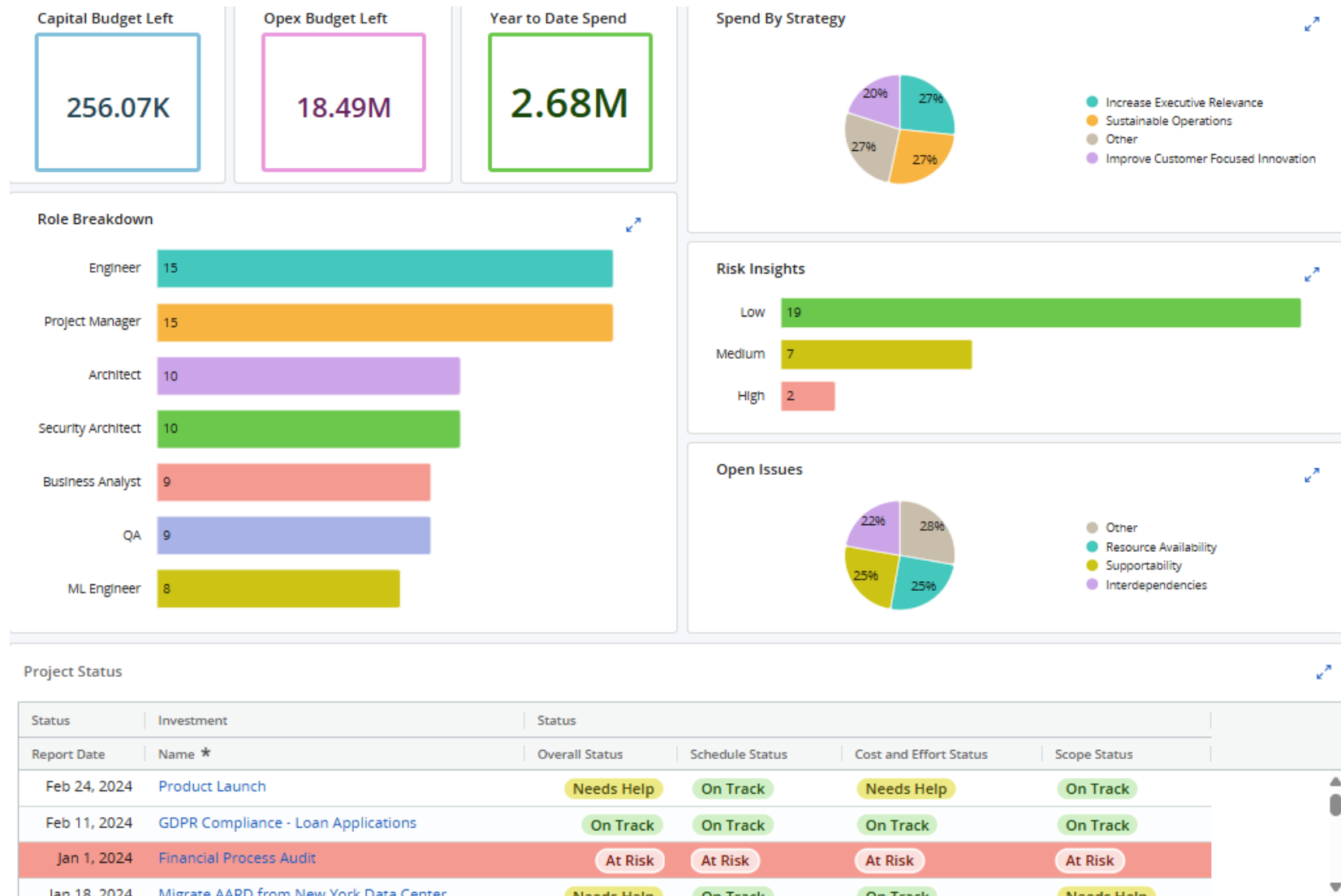
AvaiOData to AWS-hosted customers; allows access to both the DWH and transactional (query built) databases.

- **PROS:** Easy to configured / setup, easy to include additional tables / fields, transactional database access for small queries
- **CONS:** AWS-hosted environments only, query timeout limits for transactional database access

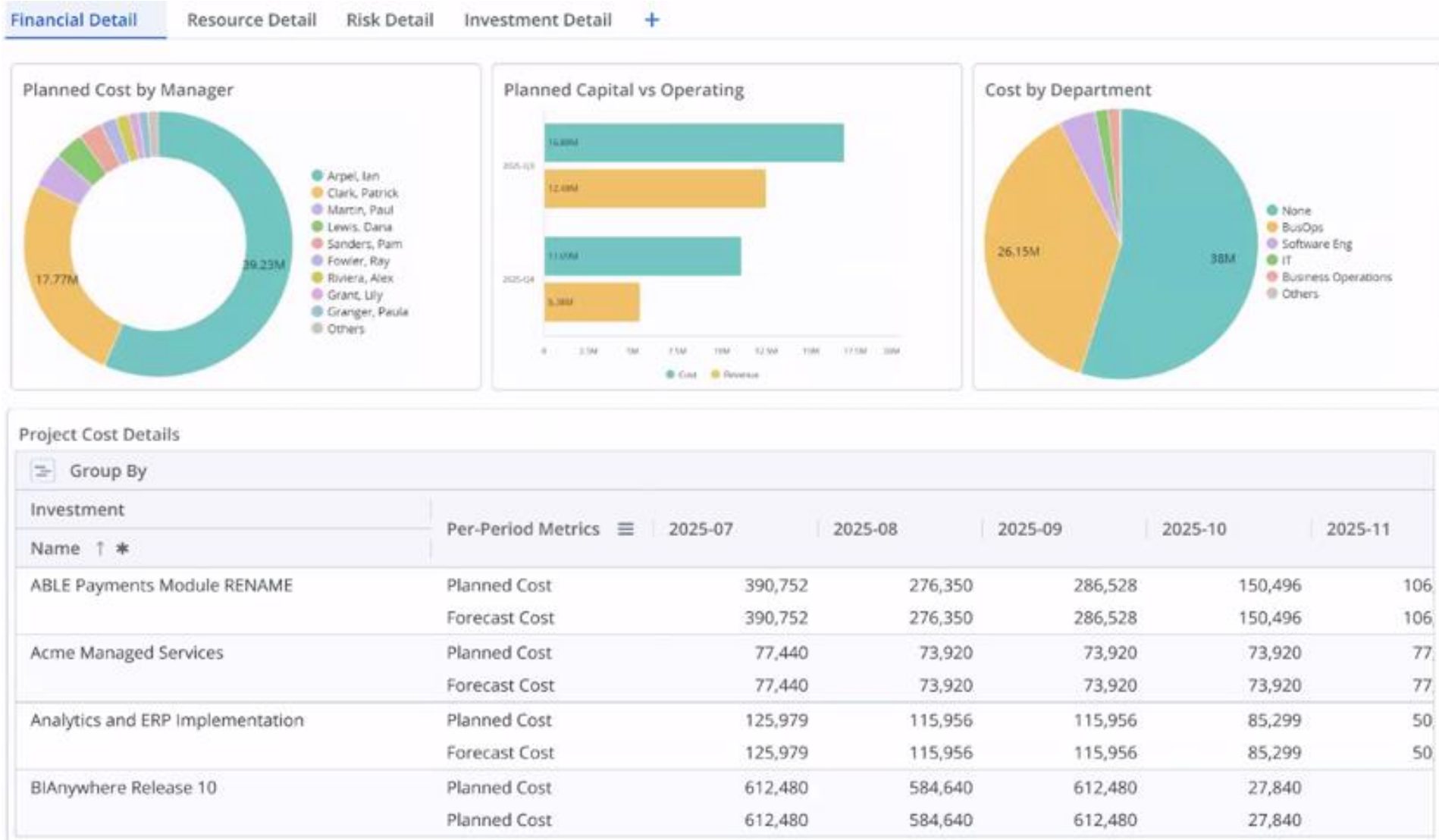
On-Premises DWH

Custom-developed process to extract data from Clarity and send it on-site to a DWH.

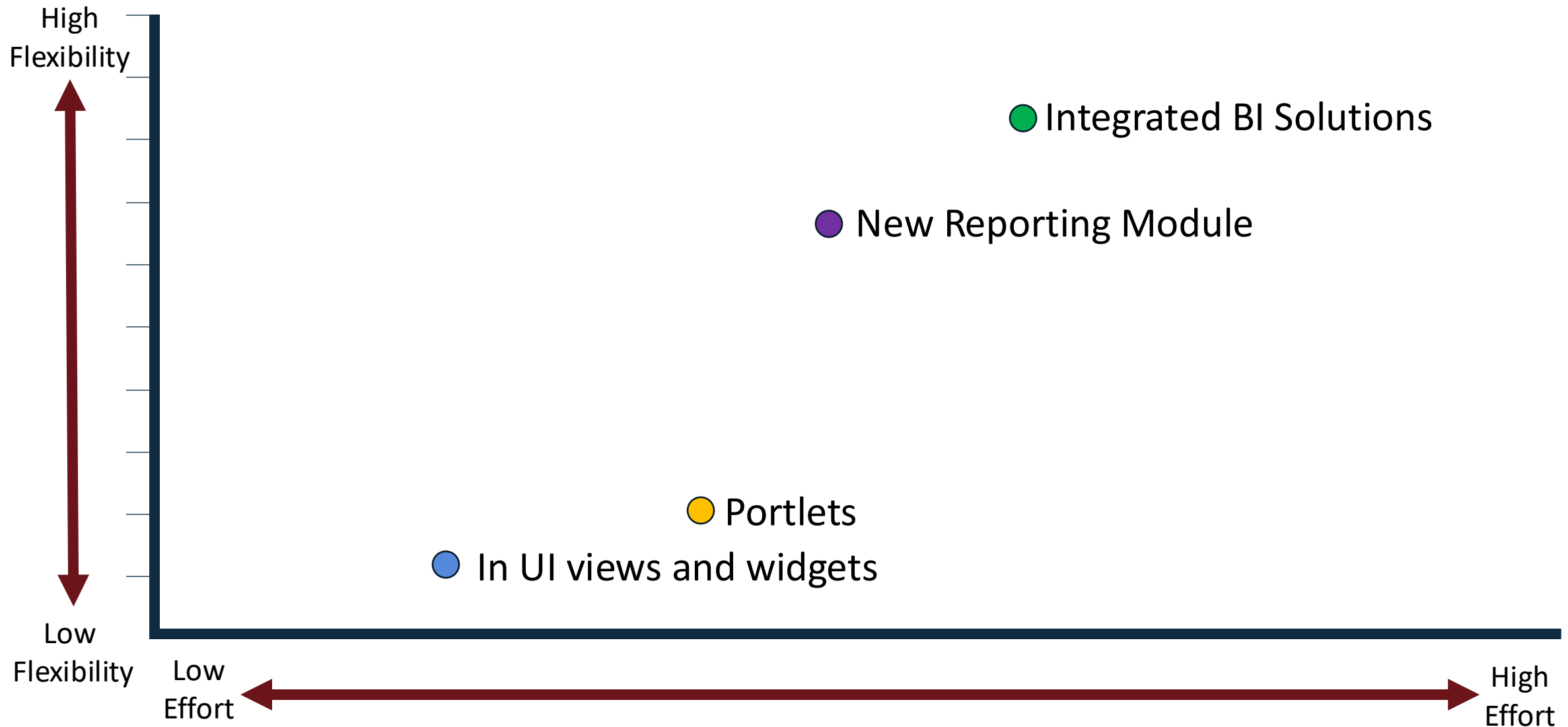
- **PROS:** Ability to marry Clarity data with other on-premises data
- **CONS:** Time-consuming setup process, Secure file transfer protocol (SFTP) + database administrator (DBA) teams need to be involved



Reporting Workspace



Flexibility vs. Effort



Questions?



Survey



Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.



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Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



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- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
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Let us know how we can improve!
Remember to fill out the class survey.



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